

**THE CALIFORNIA MULTIFAMILY CONSORTIUM—  
A NETWORKED APPROACH TO OUTREACH AND MARKETING**

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## **THE CALIFORNIA MULTIFAMILY CONSORTIUM — A NETWORKED APPROACH TO OUTREACH AND MARKETING**

### **EXECUTIVE SUMMARY**

The multifamily market has been underserved and difficult to reach with energy efficiency services in the past for a variety of reasons. Multifamily owners and developers have limited capital, knowledge and time to plan and implement energy-efficiency projects. Few sites are master metered, and the split incentive often prohibits an energy efficiency retrofit. There are many programs available to multifamily owners and developers to help them overcome these barriers, but few owners or developers have the time or expertise to understand the complex offerings available to them.

To better serve the needs of and take advantage of the opportunities in this market, Strategic Energy Innovations (SEI) pilot tested the development of a statewide Multifamily Consortium. Key market players at the Consortium's first peer forum worked together to identify the needs of the market to increase and improve implementation of energy efficiency programs, the resources currently available, and to set goals and objectives to meet the identified needs. The top goal identified was to develop a clearinghouse of information readily available to all players, as a means to educate and influence the market.

This proposal builds upon the pilot and seeks to develop the needed infrastructure to support a broad marketing and outreach plan to reach the intended audiences. We have already established the base on which we propose to build. The Consortium has over 40 members from each of the key areas of the multifamily market. Several of the members have requested the services outlined below, and have given a very positive response to the proposed offerings.

With this proposal, SEI hopes to address the needs of California's multifamily market by providing better access between the resources available and the market players. The major elements of the program include:

**Program Administration.** There is a variety of program administration needed, such as selecting and coordinating with program partners, holding monthly meetings to ensure success of the program, and coordination with Consortium members.

**Development of a Clearinghouse of Program Information and Resources.** Under this element, SEI will research and develop material needed to effectively increase participation by customers in permanent energy efficiency solutions. Material developed will include: 1) Local Roadmaps to the statewide and local programs, and other resources, 2) Articles and fact sheets, 3) A database of case studies and project examples documenting successes and lessons learned utilizing statewide and local program resources, 4) Presentations on effective use of programs and resources, 5) Email broadcasts, and 6) Electronic newsletters and press releases.

**Information Dissemination.** The Consortium's website will be the information hub and key marketing and outreach tool of the multifamily consortium. Using the interactive nature of

the internet, SEI will excel beyond the traditional newsletter format and address specific individual needs, adding tools as the needs change over time. Consortium forums will promote both formal and informal networking. In addition, stakeholders can share ideas and solutions that will lead to permanent energy efficiency improvements in the industry. Working groups will be used to identify successful marketing approaches, customer needs, effective message strategies, approaches for using statewide and local resources, and to study other market conditions and barriers. Association meetings will serve as a great opportunity for Consortium members to present information on statewide and local programs to Customers.

In addition, our approach of utilizing established networks as channels for marketing and outreach will be much more effective than working directly with customers, as we will work with entities that customers already know and trust. Currently, we have received the endorsement of the San Diego Housing Federation, Southern California Association of Nonprofit Housing, California Coalition of Rural Housing, and the Non Profit Housing Association of Northern California. Many of the association channels we will employ include: 1) websites, 2) clearinghouse, direct mail and publications distribution, 3) email broadcasts, 4) board and committee meetings 5) association meetings, and 6) technical assistance.

In summary, the variety of user-friendly mechanisms that SEI will utilize to disseminate information to Customers include a developed Consortium website, Consortium forums, working groups and association meetings.

**Reporting, Measurement, Evaluation and Verification.** We will submit monthly, quarterly and final reports and invoices. An independent evaluator will measure, evaluate and verify program successes.

## BUDGET

Budget Summary for The California Multifamily Consortium		
Item		% of Total \$ Program Budget
<b>Administrative Costs</b>		
Labor	\$ 28,522	4.4%
Benefits	\$ 8,785	1.4%
Travel/Conference/Training	\$ 1,324	0.2%
Reporting/Tracking/Development	\$ 17,061	2.6%
Materials & Handling	\$ -	0.0%
Overhead and General and Administrative Costs (on labor + benefits)	\$ 22,048	3.4%
Subcontractor Administrative Costs	\$ -	0.0%
<b>Total Administrative Costs</b>	<b>\$ 77,740</b>	<b>12.1%</b>
<b>Marketing/Advertising/Outreach Costs</b>		
Activity A: Design and Develop Program Resources	\$ 142,628	22.1%
Activity B: Web Site Design, Development, and Implementation	\$ 141,170	21.9%
Activity C: Plan and Implement Forums	\$ 51,440	8.0%
Activity D: Stipends for Associations	\$ 100,000	15.5%
Activity E: Program Presentations	\$ 50,662	7.9%
Activity F: Broadcast E-mails, Newsletters, Press Releases	\$ 31,407	4.9%
<b>Total Marketing, Advertising, Outreach Costs</b>	<b>\$ 517,307</b>	<b>80.2%</b>
<b>Evaluation, Measurement and Verification Costs</b>		
Labor	To be determined	
Benefits	To be determined	
Travel/Conference/Training	To be determined	
EM&V Reporting Costs	To be determined	
Materials & Handling	To be determined	
Overhead and General and Administrative Costs	To be determined	
Subcontractor EM&V Costs	To be determined	
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>\$ 31,000</b>	<b>4.8%</b>
<b>Other Costs</b>		
Fee	\$ 18,781	2.9%
Financing Cost	\$ -	0.0%
<b>Total Other Costs</b>	<b>\$ 18,781</b>	<b>2.9%</b>
<b>Budget Grand Total</b>	<b>\$ 644,828</b>	<b>100.0%</b>

## **DESCRIPTION OF PROPOSED MARKETING AND OUTREACH CAMPAIGN**

We propose to enhance and strengthen the California Multifamily Housing Consortium (“Consortium”) as the marketing vehicle by which existing State and Local programs can reach the key customers in the multifamily sector. These key customers include all affordable, market rate, urban and rural multifamily owners, developers, architects and builders, among others. The ultimate goal will be to establish the links that can provide customers with the tools and resources to permanently reduce their energy consumption.

The Consortium is comprised of existing multifamily organizations, cities and counties, public housing, building officials, investor owned and municipal utilities, appropriate state and federal agencies, the university and community college systems, and consultants and non profit organizations working in the sector. SEI will use Consortium members to provide information on available resources on the one side, and on the other to provide connection to customers with the ability to influence energy efficiency decisions in new and existing multifamily developments. In addition, we will directly partner with representative organizations throughout the state to utilize their established networks as a channel to conduct program marketing and outreach. This approach will be much more effective than working directly with customers, as we will work with entities that customers already know and trust.

The Consortium project will implement its marketing and outreach strategy in the following ways: 1) development of marketing and outreach resource and collateral materials; 2) development of web-based communication tools; 3) leverage of the Consortium meetings and networks; 4) direct marketing and outreach to customers through association channels.

### **Marketing Strategy**

#### ***Market segmentation and opportunity***

The Consortium will generate awareness and consumer action across several customer types. Housing agencies are developers, owners, or asset managers. Developers rehabilitate existing or construct new housing properties. Asset managers and owners operate and maintain housing properties and work with tenants. Service firms are often looked to for energy related decisions, often providing building and appliances purchase specifications. Tenant associations, which can be reached through the Consortium and our association partners, represent tenants in large buildings or developments. Housing associations represent developers and asset managers and often have financial and engineering service providers, architects, and non-profits as members. For clarification purposes, from this point forward in the proposal, we will refer generally to all of these types as ‘Customer’.

Our marketing approach will focus on the multifamily segment. The multifamily sector represents approximately 3.2 million of the State’s 11.5 million households. Over 49% were constructed before 1970, when energy consumption and electricity demand were not a policy concern. In addition, 43% of California households are eligible for the Low Income Energy Assistance Program. Analysis of energy-efficiency measures under DOE’s Weatherization Assistance Program showed that small multifamily projects achieved savings of between 9.2 to

12.6% on average<sup>1</sup>. Using 64 million Btu of annual energy use, and a 10% savings from energy measures, the opportunity in the multifamily housing sector can be as high as 6.2 million Btu per year per household or  $20.48 \times 10^{12}$  Btu per year.

### ***Targeting within segments***

Within the multifamily housing segment, four potential customer groups will be targeted for our marketing and outreach strategies. Each of these target groups will be approached through the strategies presented in this proposal:

- Housing asset managers, owners, and developers;
- Service firms (e.g., financial, architectural/engineering, consulting);
- Tenant and housing associations; and
- Intermediaries (e.g., housing, policy, and financial associations), who have members that work in the above groups

The Consortium and its resources will be positioned to be the leading source of energy-related information and resources for each segment.

## **PROGRAM DESCRIPTION AND WORKPLAN**

### **Task 1. Program Administration**

#### ***Task 1.1 Coordination Meetings***

The program team will participate in one kick off and monthly meetings to ensure the delivery of the Program.

Task 1.1 is included under Administrative Costs in the Budget.

#### ***Task 1.2 Engage Associations***

We will engage up to 10 associations throughout the state to effectively utilize existing channels to conduct marketing and outreach, increasing our ability to reach the majority and the hard-to-reach customers. The multifamily market is hard to reach in general, but in addition, one of our association partners is the California Coalition of Rural Housing. Other associations we have partnered with include the Southern California Association of Non-Profit Housing (SCANPH), the Northern California Non-Profit Housing Association (NPH) and, the San Diego Housing Federation (SDHF). These four top associations have committed to actively market the Consortium's energy efficiency information and provide outreach to their entire membership base. Where needed, we will provide our association partners with a stipend for their participation, to help defray their costs in outreach and marketing to their members.

Task 1.2 is included under Administration Costs in the Budget. Stipends are under Activity D.

### **Task 2. Develop a clearinghouse of statewide and local programs and resources**

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<sup>1</sup> Brown, Marilyn A., et. al. "Weatherization Works: An Interim Report of the National Weatherization Evaluation. ORNL/CON-373. May 1993.

*Task 2.1. Research statewide and local programs and resources*

We will thoroughly research existing energy efficiency programs in California. The program implementers we will contact with include, but not be limited to, the CPUC, CEC, California Consumer Power and Conservation Authority (CPA), Housing and Urban Development, IOUs, Non-IOU PGC Program Implementers, and the US Department of Energy. We will need to fully understand the various programs in order to develop our own database of information.

There are numerous marketing collateral pieces available in the open literature and through Consortium members. These include case studies, technical guidebooks, fact sheets, print articles, and press releases that discuss energy efficiency programs available in California. In addition to an initial search, we will need to constantly update the information.

Task 2.1 is under Activity A in the Budget.

*Task 2.2 Develop program materials*

SEI will work with stakeholders in the multifamily housing industry to collect these collateral pieces and edit them to be aligned with messages and highlight usage of statewide and local programs in energy projects. In addition, information products will be developed where needed by working with housing agencies, technical assistance providers, and service firms to fill gaps on resource usage, technologies, and other areas.

Under this activity, a number of information products will be developed by SEI for use in marketing and outreach. These are:

- Local Roadmaps to statewide, local programs, and other resources;
- Articles, fact sheets, case studies, and project examples documenting successes and lessons learned utilizing statewide and local program resources;
- Email broadcasts;
- Electronic newsletters and press releases; and
- Presentations to various association and Customer meetings.

The messages in all marketing and outreach materials will be consistent with statewide and local program messages and provide outreach and education to the multifamily market about upcoming events, technical assistance sources, new funding sources, and incentives programs. These product offerings are discussed in more detail below.

Local Roadmaps – Summaries will be designed as concise, easy to understand overviews of available state and local program incentives, technical, financial and design assistance, and other available programs and resources.

Articles, Fact Sheets, Case Studies, and Project Examples – Information will be collected and assembled into various formats that will explore approaches that have been successfully used to blend resources available through statewide and local programs and other federal, state, and local resources.

Email Broadcasts – Information will be crafted and dispatched to disseminate time sensitive information, such as upcoming events, new content available for use, and monthly newsletters. The material will be targeted for use by association partners, Consortium members, and for use on the Consortium website.

Electronic Newsletters - Consortium members will be invited to subscribe to a monthly electronic newsletter. The material will be a comprehensive recap of the month's occurrences, including a featured story.

Presentations – Presentations will be crafted for the particular audience targeted, outlining in detail the available resources, how to access them, and how others in their area have used them.

Task 2.2 is under Activity A in the Budget.

### **Task 3. Effectively disseminate information**

#### *Task 3.1 Develop Consortium Website*

The website will be the information hub and key marketing and outreach tool of the multifamily consortium. Using the interactive nature of the internet, SEI will excel beyond the traditional newsletter format and address specific individual needs and add specific tools as the needs will change over time. We will provide compelling and relevant content for our users, so that they are apprised of energy efficiency program information and resources, upcoming events of interest, functionality to interact with others through an electronic bulletin board, highlight program successes (add others, etc). SEI will create and maintain this website, to ensure that content is fresh and regularly updated. Consortium members will be encouraged to post content to foster community among consortium members.

SEI has deep experience designing and implementing web sites. We will first start with the user to understand their specific needs as we design a website to meet those specific needs. Throughout the development process, to ensure the highest standard of quality, we will continually test our site before posting it to the Consortium members, and will maintain the site throughout the duration of this program.

The Consortium website will provide the following web and electronic resources for use by its members and for dissemination to multifamily sector developers, managers, and tenants:

- Newsgroups and List Serves
- Email Broadcasts
- Case Studies
- Reminder Alerts
- Resource Room
- Event Calendar
- Feature Stories
- Opportunities Postings



In addition, the website will provide a nexus for determining member needs and capturing resource usage. A website privacy policy will be developed to protect member information. A brief description of web channel functionality is discussed below:

**Newsgroups and List Serves** - Newsgroups functionality will be integrated to allow consortium members to leverage the collective expertise of other participants and find answers to issues and barriers encountered by their customers in utilizing state and local programs. Initially, participating Consortium members will monitor and answer postings. Additional tools will be developed to provide an area for photos, files, documents and forms for public use. This newsgroup will be integrated into the website; when users search for information on a topic area, any newsgroup conversations also will be searchable.

**Email broadcasts** – Email broadcasts will be provided on a regular basis to feature new content, upcoming events, and new financial resources. The content will include headlines and brief overviews of new material and will be linked to the website, pulling Consortium members back to the site to access more detailed information. Members can customize their web usage, if chosen, to tailor notification by zip code or region.

**Case Studies** - Case studies, which we will collect and make consistent with state and local program message strategies, will be made available to members as an online resource. The case studies will be organized on the website into readily identifiable categories. In addition, they will be made searchable to facilitate their use and broader distribution.

**Reminder Alerts** - Pop up alerts will be used as reminders to consortium members of upcoming state and local events and program resources and housing policy changes. Where members are willing to use these pages on their websites, the SEI team will make them available as a tool for outreach and education to their customers and members.

**Resource Room** - A resource room will be developed on the website as a source of information on financial and technical materials that consortium members can download and provide to their customers. Typical content will include summaries of state and local program resources, guidebooks in electronic format, and presentation modules that may be downloaded and used locally for educating customers on state and local programs and technologies.

**Event Calendar** - An event calendar will be available that aggregates and categorizes training, workshops, forums, industry events, and hearings relevant to housing managers, owners, and tenant associations. New events will be included in a "What's New" column on the website, added to a weekly "What's New" email broadcast alert, and part of the website cross-linking and search functions.

**Feature Stories** - Consortium members will be invited to write feature stories about their program offerings or success stories for the website and electronic newsletters. The

stories will focus on application of California's state and local programs to permanently reduce energy consumption and demand through energy efficiency.

Opportunity Postings - An opportunity posting function will be developed on the website to allow Consortium members to post needs for information or to post requests for services or proposals on planned projects.

Task 3.1 is under Activity B and Activity F in the Budget.

### *Task 3.2 Plan and Implement Consortium Forums*

The SEI team will arrange two forums during the contract period for the Consortium. The forums will promote both formal and informal networking. In addition, stakeholders can share ideas and solutions that will lead to permanent energy efficiency improvements in the industry. Support of forums includes working with consortium steering/executive committee members to develop agendas, logistics coordination and compilation of forum results and required actions.

When needed, we will provide Members with travel funds to help defray their costs to the forums.

Task 3.2 is under Activity C in the Budget.

### *Task 3.3 Channel Marketing and Outreach*

Housing associations represent developers and asset managers and often have financial and engineering service providers, architects, and non-profits as members. They work in the interest of their members and their members know and trust them. By partnering with housing associations and leveraging their communication channels, we will reach a market that is not only hard to reach, but full of opportunity.

The SEI team will work with partner associations to disseminate information on California's statewide and local programs through their member services. Each association has hundreds of members, access to key decision-makers, and a means for effectively reaching them. Importantly, associations already hold the trust of their members; information provided by them directly will have far greater weight. Through association marketing, SEI will reach customers through association membership services including:

- Websites;
- Clearinghouse, direct mail and publications distribution;
- Email broadcasts;
- Board and committee meetings;
- Annual meetings and events;
- Technical assistance.

Association channels that we will employ under this task are discussed in more detail below.

Websites – Through this channel, we will provide basic information to association partners for use on their websites about statewide and local program features, benefits,

and their application. Links to greater detailed information, such as the Local Roadmaps, will draw customers back to the Consortium website.

Clearinghouse, Direct Mail, and Publications Distribution – We will provide resource and marketing materials for inclusion to associations who provide newsletters, mailings, and other publications to their members. Information on training and events also will be provided.

Email Broadcasts – Where associations contact their members regularly, Consortium emails will be forwarded to associations for sending to their members. Information and links also will be offered for inclusion in the association's own mailings.

Board and Committee Meetings – Members of associations that offer leadership in committee roles can act as important champions for adoption of new ideas. We will target these organizations, working with them to ensure the most effective marketing message. Successful projects by industry leaders carry additional equity in press releases, feature articles, lessons learned, and case studies.

Association Meetings – Association partners and Consortium members have numerous formal training events, conferences, and workshops throughout the year. These events will be a great opportunity for the Consortium to share information on statewide and local programs to a large audience but still have one-on-one discussions with early adopters. We will identify sources for training and technical assistance available through the statewide and local programs and arrange for these folks to present at association partnership meetings.

Technical Assistance – We will coordinate, where associations provide technical support to their members, statewide and local programs offering training and technical assistance for energy-efficiency assistance to leverage this member service.

Task 3.3 is under Activity E in the Budget.

#### **Task 4. Reporting and Performance Evaluation**

##### *Task 4.1 Reporting*

Per the requirements of the CPUC, we will submit monthly reports and invoices, quarterly reports and invoices, and a final report and invoice that discuss in detail our marketing and outreach efforts and observed engagement patterns.

Task 4.1 is under Administrative Costs in the Budget.

##### *Task 4.2 Performance Measurement, Evaluation and Verification*

An independent Evaluation, Measurement and Verification contractor will be identified and contracted to measure the effectiveness of the program. We will seek EM&V contractor input midway through the project in order to make adjustments to increase program effectiveness.

Possible evaluation reports include, but are not limited to:

- ◆ The number of housing developers and managers, tenant associations, and service firms reached through association partners' channels;
- ◆ Number that subscribes to our electronic newsletters;
- ◆ Number that registers by zip code for email alerts on upcoming events;
- ◆ Number that participate in Consortium forums; and
- ◆ Number of times the web pages are accessed.

Task 5.2 is under EM&V Costs in the Budget.

### **MEDIA OUTLETS AND PROMOTIONAL SPOTS TO BE USED**

This proposal will not use traditional advertising through television, radio, and printed media. Information transfer to associations and directly to consortium members will be provided in the form of internet-based information transfer (e.g., email, website), press releases, mass marketing to the multifamily market through Consortium member services, and event marketing.

This proposal does not include promotional spots in traditional media. We will, however submit at least 4 press releases over the course of the Program to encourage media to promote energy efficiency in multifamily housing.

### **EXPECTED TARGET AUDIENCE**

The target audience will be California's urban and rural, affordable and market rate multifamily housing market, including developers, architects, planners, builders, tenant associations, financiers, managers, consultants, nonprofits, public and private housing, utilities, city and state agencies, and IOUs. This proposal seeks to reach every segment of the public & assisted, affordable, and market rate multifamily market. Our current association partners primarily focus on the affordable side of the market; several Consortium members are developers and groups working with market rate housing; we will be targeting their associations as well.

As mentioned earlier, the multifamily market is by definition one of the hard-to-reach markets. Not only does this proposal target this market, we are also partnering with the California Coalition of Rural Housing, which primarily has members based in the hard-to-reach zip codes in the state.

### **Customer Types**

The Consortium will generate awareness and consumer action across several customer types. Housing agencies are developers, owners, or asset managers. Developers rehabilitate existing or construct new housing properties. Asset managers and owners operate and maintain housing properties and work with tenants. Service firms are often looked to for energy related decisions, often providing building and appliances purchase specifications. Tenant associations, which can be reached through the Consortium and our association partners, represent tenants in large buildings or developments. Housing associations represent developers and asset managers and often have financial and engineering service providers, architects, and non-profits as members. For clarification purposes, from this point forward in the proposal, we will generally to all of these types as 'Customer'.

Most customers never do the initial research into the energy efficiency services that are available, primarily out of lack of interest or perceived need. Housing developers, owners or asset managers, and tenants all have a stake in an energy efficient building, but there is usually a disconnect between the groups that inhibits an understanding of the need or solutions. Housing developers have high levels of involvement in selection and decisions of all large capital cost items in new and retrofit projects. They are often driven by first cost, however, since they do not manage the properties for the long term. Housing managers, on the other hand, typically are not involved in most large capital purchase decisions, except for heating systems near the end of their useful life. Housing managers deal with operating and maintenance measures and issues, but are often too busy with ‘fire drills’ to do the research that would help them to understand how to operate their building more efficiently. Tenant associations, which represent residents of individual buildings or properties, provide an aggregated voice for their members, but residents do not typically have a direct role in housing development, operations, or maintenance. Residents can have a role reporting maintenance problems early to prevent high utility costs or deteriorating physical conditions.

### Needs

Customers need several things to better access statewide and local programs and to implement permanent consumption reductions through energy efficiency. In its first meeting of the California Multifamily Consortium, SEI worked with market players to determine needs to promote more efficient, affordable housing. While this proposal does not hope to directly address each of the identified needs of the market, it will address the following:

- Awareness of available resources and how to use them;
- Access to clear, concise and objective information
- Networks of peers and industry professionals that provide a sounding board for options and offer necessary services;
- Access to decision-makers to promote change in the multifamily industry; and
- Better dialogue between Customers and resource providers to ensure a more comprehensive understanding of the needs that should be addressed.

### **EXPECTED NUMBERS OF IOU CUSTOMERS TO BE REACHED**

SEI, its 10 partner associations, the Consortium website, and the Consortium itself will reach more than 5,000 Customers both directly and indirectly through information referrals by their members. The Consortium’s membership also works with housing agencies and associated businesses throughout the State and will reach additional customers through those channels.

### **PLANS FOR COORDINATING WITH PROGRAM PROVIDERS**

The Consortium has already become a conduit of information for Members who are program providers, offering a recognized venue for outreach and information dissemination to this hard to reach market. Several program representatives have already identified and approached us to be a vehicle for their program marketing; one such example is the recently PUC funded LightWash Program. This commercial energy efficient clothes washer incentives program is an example of a statewide program that the Consortium can market. We have already researched and identified a broad spectrum of other resources, through our work thus far with the Consortium. Our first task will be to build a comprehensive database of programs offered throughout the State by

working with the PUC and with Consortium members and program providers. We will build and maintain this database, outlining what resources are available, and where they can be used. We will link each of these programs to specific examples that epitomize their usage and implementation steps, and build this information into our resource room on the Consortium website.

The web will be an ideal venue for Consortium members to notify each other about upcoming events, program offerings, etc. We will set up a notification system linking to member zip codes. In addition, we will set up a referral system that will connect members to programs, resources and technical assistance providers.

### **METHODS OF EVALUATING SUCCESS**

Success of the program will be determined by the number of IOU customers who attend presentations at association meetings and Consortium Forums, by the number of flyers and informational material handed out by Consortium members and Program partners, and by the number of hits on the Consortium website. It will be difficult to assess the direct impact of the outreach for local and statewide programs and other resources, but where practical, we will collect this information.

As the program progresses, we will be flexible and adapt our efforts based on the response to our presentations (through presentation evaluation forms), and through meetings with Customers and Consortium members. We will revise our strategy based on this input.

We will track mailing lists of all mailings sent directly or through association partners. We will keep records of attendee lists to the Consortium forums and association presentations. We will track the number of hits on the website. We will have an independent third party conduct measurement and verification. They will contact select participants through telephone surveys up to six months after the presentations. They will discuss their participation at the meetings, their use of any printed informational materials, and their use of the website. They will determine if they have implemented permanent energy efficiency changes to their sites, or if they have plans to do so. After compiling the information, they will generate a report.

### **ORGANIZATION'S CAPABILITIES**

#### **SEI'S EXPERIENCE WITH MARKETING, MEDIA CAMPAIGNS, AND EDUCATIONAL OUTREACH**

Strategic Energy Innovations (SEI) works in a variety of areas, including energy and energy efficiency, green buildings, economic development, and sustainable communities. Our community outreach programs empower and educate communities on ways to accomplish their goals by assisting them to set distinct actions, find solutions to challenges, and motivate them to achieve success. Through our work we outreach to the underserved markets such as schools, small businesses, multi-family and affordable housing and other sectors. We know techniques that work to achieve lasting results and we know how to work with State and Federal governments and the private sector to achieve these results. Our experience in marketing, media campaigns, and educational outreach is tailored to effectively meet the needs of our partners and constituents. A sampling of our experience follows.

### ***The California Multifamily Consortium***

With start-up funding from the Department of Energy and the California Energy Commission, SEI established the California Multifamily Consortium. This is a pilot marketing and outreach program to a hard-to-reach sector. In a relatively short period of time, we built a small network of key stakeholders, and utilized their network to outreach to others in the State to attend the first Consortium meeting in July, 2002. At this meeting, we identified needs of the market, and developed actions the Consortium would take to meet those needs. We were able to attract participants from each sector of the market, including State and Federal government, developers and owners in the public, affordable and market rate sectors, builders, architects, contractors, financiers, associations, tenant groups, and IOUs. The forum had a 95% participation rate.

### ***Rebuild America***

Through our involvement in Rebuild America we are working with several housing-focused partnerships in California. We were extremely pleased when one of these partnerships - the Oakland Housing Authority - was selected in August 2002 out of a field of almost 500 partnerships to receive Rebuild America's 2002 Energy Champion Award for Partnership of the Year. We, along with Rebuild's marketing and communication contractor, Potomac Communications, are on the planning team for a media and press event that will congratulate the Oakland Housing Authority and unite them with Oakland's Mayor Jerry Brown for a celebratory acknowledgement of past and future energy-related plans for the city of Oakland.

### ***Energy \$mart Schools***

SEI created and implements the Energy \$mart Schools Program with the Hawaiian Electric Company on the island of Oahu in Hawaii. The primary focus is to increase awareness in schools and small businesses on how they can save energy and money through lighting retrofits. The program trains high school students to conduct lighting audits and calculate reports on savings. The reports are marketed to schools and small businesses to show how easy it is to save money and energy.

Since then we have expanded our outreach to include Pinole Valley High School in Pinole, California. The Pinole Valley High School Energy \$mart Schools program taught students to perform school energy audits, design and implement school energy patrols, perform home energy audits, and perform small business energy audits. Students calculated energy savings using Excel, and using Word and PowerPoint developed presentations and marketed their findings and energy saving recommendations to a wide audience including teachers, the School Board of Education, the Rotary Club, chambers of commerce, and the City of Pinole. Through support from the City of Pinole and local sponsors, SEI assisted the students in raising money to take a trip to MIT, where they participated in a Building Technology class, toured several technical labs, and took the historical walk on the Freedom Trail through Boston. As a result of this educational outreach program, three of the high school students obtained summer jobs continuing their work in performing energy audits in small businesses. Our Pinole Valley High School's program won second place from the Alliance to Save Energy's Earth Apple Awards competition.

### ***Green Schools***

SEI serves as the San Francisco Bay Area coordinator for the Alliance to Save Energy's Green Schools program and provides training throughout California for teachers and custodians participating in the Green Schools program. Through extensive marketing and outreach efforts consistent to the Alliance to Save Energy's message, SEI recruited 24 K-12 schools; trained the schools teams to implement the program; provides guidance, support, and technical resources to school teams which includes facility walk through audits, program strategizing, and implementation ideas. The Green Schools program creates energy awareness, enhances experiential learning, and saves schools money on energy costs. Instructional materials provided by the Alliance to Save Energy, which correlate with State educational standards, act as key marketing materials for the program. Through our supportive relationship with PG&E, we also help market the program by offering tote bags and t-shirts.

### ***Environmental Studies Academies***

A key to our success at Pinole Valley High School was SEI's ability to leverage marketing and outreach efforts through the school's Environmental Studies Academy, which allowed the students' accomplishments to mesh with the goals of a career academy. These academies (known as Partnership Academies in California) have been growing in popularity in large high schools across the country because they create smaller learning communities. A group of students learn together with the same teachers over 2 to 4 years. The academies are organized around an industry or career theme. Many high schools in the Bay Area are forming California Partnership Academies with an environmental focus or are interested in starting such a career academy. We will build upon our successes in Pinole by selecting at least one additional existing or newly forming environmental academy. We will work closely with students and staff to expand its message to incorporate energy education into the curriculum. From this work we will further the educational outreach by capturing lessons learned, forming a model, and marketing actions to be taken to work with other academies around the country.

### ***Peer Exchange Forums and Mentoring Programs***

SEI developed and now operates the Peer Exchange portion of the Department of Energy's Rebuild America program, which conducts educational outreach to communities to help them understand how to build and implement energy efficiency programs. Unique marketing and outreach efforts include analysis of stakeholder participation, interviewing participants, agenda and meeting process development through brainstorming with select key participants who form a planning team, meeting facilitation, a resourceful website and post meeting follow-up.

This activity allows SEI to help communities make connections, pool their knowledge, gain access to available resources and ultimately discover solutions for energy efficiency that may not have been available in any other way. SEI's primary goal is to educate and empower communities to help themselves, so they can become self-sufficient and not rely on external resources for support, but rather network with each other and build support internal to their communities.

We have designed and led over twenty-five Peer Forums over the past the past five years in communities across the country. These forums have tackled a broad array of topics ranging from



overcoming barriers to affordable housing, to building an efficient fire station, and designing energy supply and efficiency projects on tribal lands.

### **SEI'S EXPERIENCE WITH ENERGY EFFICIENCY PROGRAM DELIVERY**

Strategic Energy Innovations (SEI) has extensive experience designing and implementing innovative and highly successful energy efficiency programs for communities. Over the past five years SEI has coordinated with Federal, State, local and utility energy efficiency programs. SEI has been a key player in developing the Department of Energy's Rebuild America program into a successful national program which currently consists of almost 500 community partnerships nation-wide providing assistance to implement energy efficiency projects. Much of SEI's work has been focused on addressing the energy needs and opportunities of communities in California.

From this experience SEI has developed an extensive knowledge of utility, State, Federal, and foundation resources available to serve the energy needs of California communities. SEI has also developed a sound understanding of what it takes to develop successful energy programs. Energy efficiency is at the heart of SEI's mission, in addition to the programs described in the previous section, SEI:

#### ***Develops and Operates Peer Exchange and Mentoring Programs***

In East Palo Alto, California SEI brought together businesses in an interactive peer forum that helped them find ways of overcoming challenges they faced in energy efficiency. SEI also developed mentorship relationships between businesses who have actively addressed energy efficiency issues in their buildings with businesses that needed assistance. SEI presented a paper at the 2002 ACEEE Summer Study on Energy Efficiency in Buildings highlighting our successes in this project.

#### ***Helps States Better Meet the Needs of Their Communities***

SEI has contracted with the State of Hawaii to form and sustain the Rebuild Hawaii Consortium to address the broad energy-related counties and partners. During an initial planning meeting we put together mission and goals and specific project actions. Since then, we have run several meetings focused on sustaining the Consortium.

SEI interviewed a State, universities and a city to determine energy efficiency procurement practices, and to recommend potential solutions to overcome barriers. This work has been used to help other communities nation-wide. In addition, we assisted the State of Nevada to develop their initial State-wide Rebuild America program.

#### ***Serves as a Program Representative for Community Energy Programs in California***

SEI is funded through the Department of Energy and California Energy Commission to work with cities, counties, non-profit organizations, universities and others to assist them in developing energy policies and projects for their communities. This activity allows us to educate and empower communities to help themselves develop successful energy efficiency and renewable energy projects, so they can become self-sufficient with minimal reliance on external resources for support.

By leveraging resources available from Rebuild America, the California Energy Commission, and Pacific Gas and Electric Company, SEI has helped develop the Energy Treasure Hunt program. We help school districts identify practical solutions and resources to optimize energy efficiency and classroom aesthetics while keeping within budget and payback period constraints. We bring project management expertise to ensure the projects run smoothly, coordinating with the district to ensure the sustainability of the program. In particular, we coordinated the energy efficient upgrades in demonstration classrooms; held facilities, custodial and financing training; coordinated energy audits in three school districts, and will soon expand these projects to seven more.

### ***Creatively Addresses Complex Housing Needs***

SEI has undertaken a number of different approaches to understand and pursue opportunities to increase the quality, availability, and affordability of housing through energy improvements

Through our involvement in Rebuild America we are working with several housing-focused partnerships in California. We were extremely pleased when one of these partnerships - the Oakland Housing Authority - was selected in August 2002 out of a field of almost 500 partnerships to receive Rebuild America's 2002 Energy Champion Award for Partnership of the Year.

With support from the Department of Energy and the California Energy Commission we have been working with numerous stakeholders to develop a Multifamily Consortium to help them identify ways to rapidly implement energy efficiency programs, by identifying and leveraging statewide resources. We are holding two forums to develop and shape this consortium. The first forum held in July 2002 focused on new construction in both the affordable and market rate sectors of the market. The second will focus on retrofits in both the affordable and market rate sectors. As an outgrowth of this activity, we will be working with a multi-family housing partner to help influence Energy Star purchasing decisions. This demonstration project is expected to include one or more of the following activities: 1) institute purchasing language for new construction/ remodeling to include Energy Star purchasing practices; 2) facilitate a lease agreement with a multifamily owner and retailer/manufacture of Energy Star washing machines in one or more of their developments; and 3) facilitate an aggregated bulk purchase of Energy Star appliances.

Through our work with public housing stakeholders, we have discovered that utility allowances can be significant disincentives for investments in energy efficiency. We are partnering with The Heshong Mahone Group, a Rebuild America partnership, to help public housing authorities (PHA) in California create utility allowance structures that foster energy efficient affordable housing in Section 8 homes. Public Housing Authorities in Oakland and Davis have both expressed interest in assistance. Other PHAs are expected to be equally interested as information on the advantages of an energy efficient utility allowance schedule spreads through the PHA community.

## **QUALIFICATIONS**

### **Project Leader and Key Staff**

**Cyane B. Dandridge** is the Executive Director and President of Strategic Energy Innovations (SEI), a non-profit organization dedicated to community and business empowerment around energy issues. She has extensive experience in business management and energy policy, from businesses she has established and run, and in designing and implementing international policies for energy-efficient equipment. She received her master's degree in building technology from the Massachusetts Institute of Technology for her work in international energy efficiency policies and technologies. She has worked at affecting policy changes on the local level, and for the federal government, with a focus on international voluntary programs. She helped design and manage many of the first Energy Star programs at the EPA. She was a leader of one of the first Rebuild America Community Partnerships. Her areas of expertise include establishing new business concepts and in combining a technical and a policy or business oriented approach to energy efficiency. Ms. Dandridge is well published in books, journals and conference proceedings.

Under SEI, Ms. Dandridge developed and implements the US Department of Energy's Rebuild America Peer Forum and Mentoring program. She provides a variety of assistance relating to energy policy and sustainability to communities in California for the California Energy Commission, the Department of Energy and Pacific Gas and Electric Company. Included in her work with Pacific Gas and Electric is a Small Business Energy Efficiency program with the City of East Palo Alto. In addition to her work in California and the national work with Rebuild America, she helped establish and supports the Rebuild Hawaii Consortium, and works with Hawaiian Electric Company to run the Energy Smart School initiative on Oahu. She was recently nominated for the 2001 Chevron Conservation Award.

**Thais Gurich** will be responsible for day-to-day coordination for the SEI work on this project. Ms. Gurich is a Project Coordinator at Strategic Energy Innovations (SEI), a non-profit organization dedicated to empowering underserved communities around energy issues. Ms. Gurich graduated from the University of Houston with a BS degree in Sociology and holds a nationally recognized certificate for nonprofit management from the American Humanics Program. She has a comprehensive understanding of the nonprofit sector, ranging from community outreach to strategically planning for an organization's future. She has experience developing and implementing environmental after-school and summer programs for inner-city youth and has training in sustainable practices along with experience in organizing and participating in grassroots organizing campaigns revolving around issues such as global climate change and air pollution. Her interests include planning and implementing educational outreach programs, sustainable community development, and environmental advocacy.

Under SEI, Ms. Gurich coordinates the planning and implementation of the Energy Star Purchasing Program where she encourages and facilitates the efforts of the affordable multifamily sector to change their procurement practices to include Energy Star appliances. She is also currently working on the CA Multifamily Consortium Pilot Program to facilitate collaboration efforts of the state's multifamily market to identify energy efficiency related market needs and barriers, provide resources, and cultivate links between the resources, knowledge, and multi-family housing providers. Ms. Gurich also works closely with SEI's Executive Director, Ms. Dandridge to implement the Energy Efficient Two Tier Utility

Allowance Program for public housing authorities, and the Partnership for Energy Affordability in Multifamily Housing to empower California's affordable multifamily market to implement energy efficiency measures.

**Ward Bouwman** will be a member of the web development team and will work closely with the web development subcontract Charles Mazzanti. Mr. Bouwman is the treasurer and board member of SEI and the president of the E SCREENING ROOM, an online movie theater dedicated to the screening and distribution of documentary films. He was responsible for creating and integrating the localization departments for Discovery channel and Palladium (now Mattel). He holds a bachelor in engineering and computer technology and a Masters degree in Mass Communications of Emerson College in Boston.

### **Qualifications of Subcontractor**

Charles Mazzanti is part of the web development team and will be responsible for graphics development and layout. He is experienced and proficient in creating user interface design, information design, bitmap, vector and 3D graphics, animations, special effects, digital video and streaming video for CD-ROMs and the internet, multimedia, interactive kiosks, print and package design. His clients have included Electronic Arts, Oracle Corporation, Sun Microsystems, Knowledge Adventure, Hartford Insurance Group, Ask Jeeves, Cybergold, Volpe, Welty, Wheelan and Brown, The National Japanese American Historical Society and The Smithsonian Institution.

### **Qualifications of Selected Association Partners**

Four housing associations have agreed to participate in this proposal to provide outreach channels to their membership. They will not receive funding but are discussed here as subcontractors. These associations are:

- Southern California Association of Non-Profit Housing (SCANPH)
- California Coalition for Rural Housing (CCRH)
- Non-Profit Housing Association of Northern California (NPHANC)
- San Diego Housing Federation (SDHF)

#### ***Southern California Association of Non-Profit Housing (SCANPH)***

SCANPH's geographic reach includes Los Angeles, Orange, Riverside, San Bernardino, Ventura and Santa Barbara Counties. SCANPH has more than 550 members including non-profit housing developers, social service agencies and community groups, private businesses, local government agencies, lenders, and individuals all engaged with affordable housing. SCANPH serves as a resource center and clearinghouse for Southern California nonprofit housing developers. SCANPH resources, activities, and member services include:

- A bi-monthly newsletter;
- A membership and resource directory ;
- Regular technical training workshops

- Informal forums covering a variety of current housing issues of interest to the membership;
- A clearinghouse for up-to-date information on housing programs and technical assistance referrals ;
- An annual conference on education, resource sharing, networking, and training for the Southern California non-profit housing community;
- Research and analysis on housing issues; and
- On-going working groups on policy and technical topics.

### ***California Coalition for Rural Housing (CCRH)***

CCRH's geographic reach extends from the Oregon border in the north, to the Mexican border in the south, and east to the border with Nevada and Arizona. This includes large portions of the Central Valley, the Central and North Coasts, the Northern and Eastern Mountains, and the Southern Deserts. CCRH membership characteristics include 30 community-based, nonprofit and public builders of affordable housing and another 250 other non-profits, for-profit, and business members including housing associations and financial organizations. CCRH has more than 800 total organizations on its email distribution list.

CCRH brings access to the following resources, activities, and member services:

- Email broadcasts;
- Website;
- Internship job training programs;
- Tenant education and assistance;
- Research on issues such as farmworker housing and sustainable communities;
- Database of demographics, poverty, and housing data in rural areas;
- Policy advocacy and annual forums; and
- Board meetings.

### ***Non-Profit Housing Association of Northern California (NPH)***

NPH's geographic reach is the greater San Francisco Bay Area. NPH is a membership organization representing the interests of approximately 500 affordable housing developers, local governments, leading financial institutions, environmental and faith-based non-profits, community development corporations, and individual activists working primarily in the greater San Francisco Bay Area.

NPH resources, activities, and member services include:

- Email broadcasts;
- Website, which includes "What's New" Pop-up windows;
- A web based action center with links for events/training, campaigns, and a tool box ;
- A web based knowledge bank, which includes information on policy and other housing groups;
- Publications;

- Policy advocacy and annual forums; and
- Board meetings.

### ***San Diego Housing Federation (SDHF)***

SDHF's geographic reach includes all sectors of San Diego County. It is a coalition of nonprofits, community development corporations, community based organizations, for-profit developers, lending institutions, foundations, government agencies, architects, engineers, economic development corporations, accountants, business groups, other membership organizations and individuals. SDHF membership includes 18 non-profit housing developers, 13 local governments, 26 for profit developers, builders, and lenders, 9 trade associations, 15 social service organizations, and 38 individuals. SDHF has 350 individuals and organizations receiving their newsletter electronically.

SDHF provides and/or participates in training its members and the community in areas such as needs assessment, financing, construction, management, marketing, assets management service delivery and project evaluation. Other SDHF member resources, activities, and services include:

- Monthly newsletter, Housing and Community Development News to 350 groups and individuals;
- Weekly email updates to 175 members;
- Website that is updated daily and averages 50 visits per day;
- Annual awards event honoring the best in the field;
- Annual housing conference that has 250 attendees;
- Public policy, coalition and public education initiatives;
- Membership brown bag lunches and breakfast meetings that has up to 25 attendees; and
- Membership and resource directory.

## DISCLOSURE OF FINANCIAL OR ORGANIZATIONAL RELATIONSHIPS RESULTING IN POTENTIAL CONFLICTS OF INTEREST

To the best of our knowledge, the parties that are proposing on this program, Strategic Energy Innovations and Charles Mazzanti do not have any financial or organizational relationships that could result in potential conflicts of interest.

## ESTIMATED PROJECT TIMELINE

Task Name	Start Date	End Date	Duration	Q1	Q2	Q3	Q4
<b>TASK 1: ADMINISTRATION</b>	1/2/03	12/15/03	12 months	◆	◆	◆	◆
Manage and coordinate meetings	1/2/03	12/15/03	12 months	◆	◆	◆	◆
Engage Associations	1/2/03	12/15/03	9 months	◆	◆	◆	
<b>TASK 2: DEVELOP CLEARINGHOUSE</b>	1/2/03	12/31/03	12 months	◆	◆	◆	◆
Initial research and development of collateral pieces	1/2/03	6/30/03	6 months	◆	◆		
Maintain up-to-date clearinghouse	4/2/03	12/15/03	9 months		◆	◆	◆
<b>TASK 3: DISSEMINATE INFORMATION</b>	1/2/03	12/31/03	12 months	◆	◆	◆	◆
Design and develop web site	1/2/03	4/30/03	4 months	◆	◆		
Maintain up-to-date live web site	3/1/03	12/31/03	10 months	◆	◆	◆	◆
Plan and conduct forums	2 <sup>nd</sup> Qtr, 4 Qtr	2 <sup>nd</sup> Qtr, 4 Qtr	1 1/2 months each		◆		◆
Coordinate and conduct working groups	1/2/03	12/31/03	12 months	◆	◆	◆	◆
<i>Association marketing and outreach</i>	4/1/03	12/31/03	9 months		◆	◆	◆
<b>TASK 4: REPORTING AND EM&amp;V</b>	1/2/03	12/31/03	12 months	◆	◆	◆	◆
Monthly/Quarterly/Final Reports to CPUC	1/2/03	12/31/03	12 months	◆	◆	◆	◆
Develop and execute EM&V plan	4/15/03	12/31/03	8 1/2 months		◆	◆	◆

## **SIGNATURE**

I hereby certify that I have written this document and know its contents; that to the best of my knowledge, information and belief, formed after reasonable inquiry, the facts are true as stated; that any legal contentions are warranted by existing law or a good-faith argument for the extension, modification, or reversal of existing law; that this document is not tendered for any improper purpose; and that I have full power and authority to sign this document.

November 27, 2002

Respectfully Submitted,

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Cyane Dandridge  
Executive Director  
Strategic Energy Innovations  
175 N Redwood Drive Suite 150  
San Rafael CA 94903  
(415) 507-2184  
(415) 507-1975 - fax  
Cyane@seiinc.org



## **CERTIFICATE OF SERVICE**

I, the undersigned, state that on the 27th day of November 2002, I submitted an original and six copies to the CPUC Docket Office in San Francisco plus served a document entitled:

THE CALIFORNIA MULTIFAMILY CONSORTIUM—  
A NETWORKED APPROACH TO OUTREACH AND MARKETING  
2003 ENERGY EFFICIENCY PROGRAM SELECTION  
R.01-08-028

- Submitted by e-mail to the R01-08-028 Service List.
- Submitted by Federal Express in hardcopy to Administrative Law Judge Sarah R. Thomas in San Francisco.

I certify and declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated November 27, 2002, at San Rafael, California

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Cyane B. Dandridge  
Executive Director, Strategic Energy Innovations

## **LIST OF ATTACHMENTS**

Appendix A: Letters of Support from Association Partners

Appendix B: Resumes of Key Personnel

Appendix C: Association Partner Summaries

## **Appendix A**

### ***Letters of Support***

from

Non-Profit Housing Association of Northern California

California Coalition of Rural Housing

San Diego Housing Federation

Lydia Tan

BRIDGE Housing Corporation

Vice President & Secretary  
Dennis Lalor  
Santa Clara County Housing

Treasurer  
Dongia Gilmore  
Community Housing  
Development Corporation  
of North Richmond

Vic Agostino  
Mayor, San Mateo, California

Tangerine Brigham  
Corporation for  
Supportive Housing

Donald Fark  
Tandem Neighborhood  
Development Corporation

Joanne Lee  
Community Community  
Development Center

John Lowry  
Aurora Housing  
Development Corporation

Norma Thompson  
City of Richmond  
Redevelopment Agency

Staff  
Dianne Spaulding  
Executive Director

Douglas Shoemaker  
Policy & Program Director

Tina Duong  
Communications & Resource  
Development Director

Shannon Dodge  
Regional Coordinator

Carlie Erickson  
Administrative Assistant

Amie Haiz  
Bookkeeper

November 25, 2002

Ms. Cyane Dandridge  
Executive Director  
Strategic Energy Innovations  
150 North Redwood Drive, Suite 150  
San Rafael, CA 94903

Dear Ms. Dandridge:

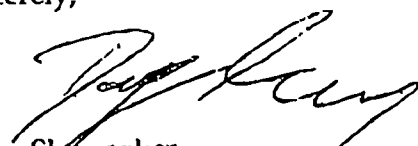
On the behalf of The Non Profit Housing Association of Northern California (NPH) I am writing to support your proposal for the California Multifamily Consortium. We feel this is an invaluable service, and fully endorse this proposal.

NPH represents the interests of approximately 500 local governments, affordable housing developers, leading financial institutions, environmental and faith-based non-profits, community development corporations, and individual activists working throughout rural and urbanizing parts of California. Our members have produced over 20,000 affordable rental and for-sale homes targeted to low- and very low-income households and people with special needs. We are certain that they will utilize the services of the CA MF Consortium to assist them on their energy efficiency projects.

We are excited to partner with SEI to provide marketing and outreach support for the CA MF Consortium, as we feel this program will provide invaluable information to our members and provide them with an innovative solution to the barriers facing energy efficiency in the rural and urbanizing, affordable housing sector.

This proposal fills a critical need to disseminate information on energy efficiency programs and resources throughout the state of California in an easily accessible and organized way.

Sincerely,

  
Doug Shoemaker  
Policy Director



Non-Profit Housing Association of Northern California  
369 Pine Street, Suite 350 San Francisco, CA 94104  
Phone 415 989 8100 Fax 415 989 8100 www.nonprophousing.org



## California Coalition for Rural Housing

926 J Street, Ste. 1400  
Sacramento, CA 95814  
(916) 443-4448 (fax) 447-0458  
[www.calruralhousing.org](http://www.calruralhousing.org)

November 25, 2002

Ms. Cyane Dandridge  
Executive Director  
Strategic Energy Innovations  
150 North Redwood Drive, Suite 150  
San Rafael, CA 94903

Dear Ms. Dandridge:

I am writing to support your proposal for the California Multifamily Consortium. We feel this is an invaluable service, and fully endorse this proposal.

The California Coalition of Rural Housing represents the interests of approximately 30 community-based, nonprofit and public builders of affordable housing, as well as local government officials, grassroots organizations, and activists, working throughout rural and urbanizing parts of California. Our member builders produce a variety of housing targeted to low- and very low-income households for ownership and rent and for people with special needs. They include the largest developers of mutual self-help housing for first-time owner-builders/homebuyers in the country and the largest developers of farm labor housing in California. We are certain that they will utilize the services of the CA MF Consortium to assist them on their energy efficiency projects.

We are excited to partner with SEI to provide marketing and outreach support to the CA MF Consortium through our existing communication channels and networks. We feel this program will provide invaluable information to our members and provide them with an innovative solution to the barriers facing energy efficiency in the rural and urbanizing, affordable housing sector.

This proposal fills a critical need to disseminate information on local and state energy efficiency programs and resources in an easily accessible and organized way.

Thank you for your time and consideration.

Sincerely,

Rob Wiener  
Executive Director  
California Coalition of Rural Housing



**SAN DIEGO HOUSING FEDERATION**  
PROMOTING QUALITY AFFORDABLE HOUSING AND COMMUNITY  
DEVELOPMENT THROUGHOUT SAN DIEGO COUNTY

450 B Street, Ste. 1010 • San Diego, CA 92101-8007  
(619) 239-6693 • FAX (619) 239-5523  
[www.housingsandiego.org](http://www.housingsandiego.org)  
Email: [sdhf@housingsandiego.org](mailto:sdhf@housingsandiego.org)

November 26, 2002

Ms. Cyane Dandridge  
Executive Director  
Strategic Energy Innovations  
150 North Redwood Drive, Suite 150  
San Rafael, CA 94903

Dear Ms. Dandridge:

On behalf of the San Diego Housing Federation (SDHF), I am writing to support your proposal for the CA Multifamily Consortium. We are very excited for the services you are proposing to offer through the Consortium, particularly in the development of a database of case studies and project examples that will help our members to fully understand how the different statewide and local energy efficiency programs can work for them.

SDHF has a member base of 119, made up of nonprofit affordable housing developers, local government housing agencies, for profit developers, builders, lenders, trade associations, social service organizations and individuals. Members serve San Diego County and south Riverside County.

We agree to partner with you by sharing our network channels and member services to the CA MF Consortium's marketing and outreach efforts. We believe that by doing this, our members will receive access to and an understanding of the information they need to successfully utilize the energy efficiency programs that currently exist.

Sincerely,

Tom Scott  
Executive Director  
San Diego Housing Federation

## **Appendix B**

### ***Resumes*** **of** ***Key Personnel***

## Cyane B. Dandridge

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Ms. Cyane Dandridge is the Executive Director of *Strategic Energy Innovations*. She has over 15 years experience in business management and energy policy. Her areas of expertise include establishing new business concepts and combining a technical and policy or business oriented approach to energy efficiency.

### **EXPERIENCE**

#### **Executive Director, Strategic Energy Innovations.**

Created, established and manages Strategic Energy Innovations (SEI), a non profit organization dedicated to community and business empowerment around energy issues. Developed the US Department of Energy's Rebuild America regional Peer Exchange and Peer Mentoring program. Develops and markets community-oriented energy policies for the California Energy Commission. Provides a variety of assistance relating to energy policy and sustainability to communities in Northern California for the California Energy Commission, Department of Energy and Pacific Gas and Electric. Designed community-oriented energy policies with the States of Hawaii and Nevada. Researched procurement practices relating to energy efficiency for local governments. Trains school administrators, teachers, and custodians for Green Schools program across State of California. SEI is the San Francisco Bay Area local program lead for Green Schools. 1997- present.

#### **Peer Exchange**

Ms Dandridge coordinates and develops the Peer Exchange segment of the Department of Energy's Rebuild America program. She leads groups to create and form relationships around common issues, building strong regional teams. The process she has developed helps people to make connections, pool their knowledge, gain access to available resources and ultimately discover solutions. She facilitates Peer Forums, which includes analysis of stakeholder participation; interviewing participants; agenda and meeting process development through brainstorming with select key participants who form a planning team; meeting facilitation; and post meeting follow-up to develop meeting summaries. Ms Dandridge has been involved in meeting coordination since 1993, and has held six Peer Exchange Forums in the past two years. Participant response is consistently high, in evaluation (9 out of 10) and attendance (increase of four hundred percent in two years).

#### **Multifamily Sector**

Ms. Dandridge is the Director of the California Multifamily Housing Consortium. The purpose of the Multifamily Consortium is to improve delivery of energy efficiency services to the multifamily sector, in both existing and new construction multifamily dwellings. She coordinates an Energy Star purchasing program for affordable housing owners and developers and a marketing, outreach and delivery program for affordable housing providers in the San Francisco Bay Area. She is also the Rebuild America Program Representative for the Oakland Housing Authority, Rebuild Partnership of the Year, Stanislaus County Affordable Housing Corporation, and the Non Profit Housing Association.

#### **Director, ReEnergize East Bay.**



Established and managed the US Department of Energy's Rebuild America program in the San Francisco Bay Area. Designed and implemented new business models and delivery mechanisms to develop a community-oriented infrastructure to dramatically increase the implementation of energy-efficiency. Annual budget in excess \$800,000. 1995-1997.

**Program Manager, Environmental Protection Agency.**

Developed design, implementation and marketing plans for six new voluntary energy-efficiency programs under the Energy Star label within an eight-month time period. Products include office equipment, and residential heating and air conditioning equipment. Promoted programs through extensive public speaking to industry, utilities, purchasers, energy managers, public interest groups and the general public. Supervise five staff members, manage program budget in excess of \$300,000. 1994-1995.

**Research Associate, Massachusetts Institute of Technology.**

Developed technical and policy analyses for international programs on energy-efficient office equipment. Established test procedures for the Energy Policy Act Testing and Information Program for Office Equipment. Produced technology assessment and comparison of energy-efficient office technologies. 1992-1994.

**Research Associate, University of Bordeaux.** Researched and authored a comparison of policies for energy-efficient office technology in Europe, Japan and the United States. 1993.

**Senior Engineering Technician, Intel Corporation, Portland OR.**

Tested quality and reliability of bipolar transistors. Developed process for chip address system. 1991.

**Founder/President, The Furies Cleaning Service, Wellfleet MA.**

Established and operated business with a six year growth rate of over 100 percent annually. Directed marketing plan, business development and public relations. Managed and performed personnel functions for 15+ employees. 1985-1991.

**Carpenter/Builder,** Designed and built a passive solar house. 1983-1984. **Albany Roofing and Remodeling,** Albany NY. 1984-1985.

**EDUCATION**

**Massachusetts Institute of Technology, Cambridge, MA.**

Master of Science in Building Technology. 1994. Thesis: "Energy Efficiency in Office Technology." Focus on business management and energy efficiency in buildings.

**University of Bordeaux, Bordeaux, France.**

Degree des Etudes Supérieur. 1994. Thesis: "Energy Efficiency in Office Equipment: A Policy Comparison Between Europe, Japan and the United States."

**Reed College, Portland, OR**

Bachelors of Arts in Physics, 1989. Thesis: "The Effect of the Sun on the Earth's Atmosphere." Sunlight energy levels. Greenhouse Effect, IR radiation. Minor in Anthropology.

**SKILLS**

- ◆ Meeting planning, facilitation and teambuilding
- Understands how to bring people together and engage them in a creative exchange of ideas
- Utilizes all of the creative resources of a team; in generating participation, engagement and inclusion
- Creates a process which motivates people to work together
- Leads groups to create together and to form relationships around common issues
- Ability to set up conditions which help people make connections, pool knowledge, gain access to resources and discover solutions
- Listens, in ways that generates creative solutions and an in depth understanding of issues
- Fifteen years experience in business management and energy policy
- Ability to establish new business concepts and delivery mechanisms
- Combines a technical and policy or business oriented approach to energy efficiency

Basic knowledge: French, Portuguese, German, Spanish. Extensive computer experience including programming, database, word processing and graphics software platforms.

**HONORS****Grants:**

State of Hawaii 1998, 1999, 2000. Pacific Gas and Electric PGC, 1998, 2000. Department of Energy, 1994, 1996, 1998, 1999, 2000. California Energy Commission, 1997, 1999. Consortium for Energy Efficiency, 1999. State of Nevada, 1998. Environmental Protection Agency, 1994. European Union and University of Bordeaux, France, 1993. Electric Power Research Institute, 1992-1993.

**Scholarships:**

Reed College, Portland, OR, 1985-1989. Music scholarship, The Putney School, Putney VT, 1982-1984.

**Public Recognition:**

Five recognition awards for Peer Exchange Forums under the Department of Energy's Rebuild America Program. Articles recognizing achievement in several magazines, including "Energy and Environment", and chapter in "Ecodemia," by the National Wildlife Federation. Employee Recognition Award from the Environmental Protection Agency.

Publications and references available upon request.

## Thais M. Gurich

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### EXPERIENCE

#### **Project Coordinator, Strategic Energy Innovations**

Project lead on the Energy Star Purchasing Project. Partnering with multifamily stakeholders to provide procurement specifications assistance for Energy Star. Analyzes life cycle costs of conventional and energy efficient appliances. Responsible for the day-to-day coordination of the CA Multifamily Consortium. Responsibilities include program marketing and outreach, logistical arrangements, program planning, and coordination efforts between members. Serves as a program representative for the energy efficient Two Tier Utility Allowance Program for public housing authorities and the Partnership for Energy Affordability in Multifamily Housing. October 2002 – present.

#### **Project Assistant, Strategic Energy Innovations**

Planned and implemented of the Energy Star Purchasing Program. Researched and analyzed the Energy Star procurement practices of northern California's affordable housing market. Served as a program liaison to several of the US Department of Energy's Rebuild America partnerships in California. Responsibilities included understanding a partnership's unique needs, providing resources for information, technical assistance, funding, project planning and implementation, and follow-through to ensure the project goals are achieved. Provided assistance in the marketing and implementation of the Alliance to Save Energy's Green Schools energy conservation program in 25 k-12 schools in northern California. Authored a proposal for \$10,000 to fund the Energy Smart Schools program. August - October 2002.

#### **Volunteer Coalition Builder, Renewable Energy Action Project (REAP)**

Researched nationwide organizations and marketed REAP to those with similar missions and goals. Leveraged resources and networks. Increased membership by over 25%. March – May 2002.

#### **Volunteer Event Coordinator, Marin Conservation League**

Coordinated Marin's 2002 Earth Day Celebration. Responsibilities included community outreach, and the coordination of organization tabling, vendor booths, live music, guided nature walks, acquisition of city permits, and sanitation works. April 2002.

#### **Program Coordinator Intern, Natural Legacy**

Spearheaded and implemented an inner city high school Student Environmental Art Council (SEAC) program. Planned and facilitated bimonthly student council meetings. Aided high school students in writing educational lessons for k-8 students based on their own environmental experiences. Served as a liaison to key school personnel in Texas and initiated effective community partnerships. Assisted in planning and leading youth after-school and summer environmental art education programs. Identified organizational funding sources and wrote a grant proposal for \$38,000 to support the SEAC program. Provided administrative support to the Executive Director. Received formal training in environmental education curriculum design and integration. June – December 2001

**Local Organizer, Cool Texas Network**

Planned a local statewide public forum on global warming featuring Ross Gelbspan (author and Pulitzer Prize winning journalist) and Reverend Sally Bingham (California Interfaith Power & Light), in coordination with multiple organizers across the state of Texas. Led grassroots organizing efforts. Conducted community outreach and volunteer management. Represented a coalition of environmental and faith-based organizations at numerous public events. September – December 2001.

**Student Vice President, Alpha Kappa Delta (International Sociology Honor Society): Epsilon of Texas**

Increased club's membership by 50%. Co-organized a panel discussion and spoke as a panelist on the feminist movement in Houston. January – December 2001.

**TRAINING**

- Grant Writing Series, ASA Resource Development Group, Inc., Houston, TX. 2001
- The Natural Step Seminar: Framework for Sustainability, Houston, TX. 2000 & 2001.
- Teacher's Conservation Institute: Project Learning Tree and Project Wild curriculum training, Pumpkin, TX. 2001.
- School Habitat Curriculum Writing Workshop, Houston, TX. 2001.
- Environmental Educator Certification Workshop: Wet in the City and Science of Galveston Bay environmental education training, Houston, TX. 2001.

**EDUCATION****University of Houston. 2001**

Bachelors of Science degree in Sociology with a minor in Studio Art. Student Vice President of Alpha Kappa Delta's (International Sociology Honor Society) University of Houston's campus chapter.

**American Humanics Nonprofit Management Certification Program. 2001**

National certification in nonprofit management. Additional coursework and co-curricular requirements incorporated board/committee development, fundraising principles and practices, human resource development and supervision, general nonprofit management, nonprofit accounting and financial management, nonprofit marketing, program planning, and risk management.

# Janet Ferraiolo

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## EXPERIENCE

### **Executive Assistant, Strategic Energy Innovations**

Assist Rebuild America program representative with two of the US Department of Energy's Rebuild America partnerships in California. Work with partnerships to successfully implement energy saving objectives. Responsible for providing technical assistance, project planning and implementation, and follow-through to ensure the project goals are achieved. Additionally, Ms. Ferraiolo supports the Bay Area Coordinator in the implementation of the Green Schools Program, sponsored by the Alliance to Save Energy, in several sites in the Bay Area. This program works with teachers to incorporate energy efficiency information into their curriculum. For several other projects, Ms. Ferraiolo is responsible for meeting and travel logistics, correspondence, reporting, and invoicing. 2001 – present.

### **Associate Analyst/Executive Assistant Marin General Hospital**

Supported implementation of new hospital information system in a variety of ways including training of clinical staff, providing technical assistance via telephone, coordinated passwords and security privileges to users. Ms. Ferraiolo also acted as lead analyst for implementation of new call accounting database system for telecommunications departments which included software installation, development of database, development of procedures, and training of users. Maintained President's calendar, handled calls and correspondence. As executive assistant to hospital's president, Ms. Ferraiolo managed the president's calendar and correspondence, support the board of directors by scheduling meetings, preparing agendas and meeting packets, reporting meeting minutes, and planning special meetings and events. 1999 – 2001.

### **Special Projects Manager/Administrative Assistant Alive & Well! Institute of Conscious BodyWork**

Developed schedule of classes and coordinated the production of the semi-annual Calendar of Events. Helped organize Alive and Well!'s first bodywork fair. Led marketing efforts for the training and treatment classes. Marketed and organized Alive & Well!'s first summer day camp for children. As administrative assistant, Ms. Ferraiolo coordinated student and professional bodywork clinics; managed facilities rentals; maintained database of student records; and acted as back-up admissions counselor. 1995 – 1998.

### **Program Manager/Programmer Analyst, Information Technology International**

As the program manager for the Comprehensive Child Development Program, Ms. Ferraiolo provided management support to federal project officer and grantees to implement and evaluate family support demonstration grant programs at 34 sites across the country. Managed a staff of six, updated documentation and software of existing national data collection system, managed the national data center responsible for data management, and acted as liaison among grantee staff, researchers, and federal project officer to effectively develop compliance requirements. Conducted monitoring site visits of grantees' data systems,

and helped plan and facilitate national grantee conferences. As a programmer-analyst, Ms. Ferraiolo also provided support for a variety of health and family support projects across the country (including a drug abuse hotline, prenatal health programs, a runaway and homeless youth and transitional living program for teens), participated in all system phases. All activities involved working closely with programmatic staff and software developers to ensure needs were clearly and effectively translated into an effective, user-friendly information system. 1991 – 1995.

### **Industrial Engineer, Naval Ordnance Station**

Supported program officers and contracting officers in the procurement of ship systems. Analyzed production methods and cost proposals to identify appropriate costs and participated in negotiations for procurement of \$50- to \$120-million ship systems.

### **EDUCATION**

**The George Washington University, Washington, DC**

Masters of Science in Engineering Management with concentration in information systems management, 1990

**Virginia Polytechnic Institute and State University, Blacksburg, VA**

Bachelors of Science in Industrial Engineering and Operations Research. 1987.

### **SKILLS**

- Diverse experience coordinating and supporting projects, events, and teams.
- Meeting logistics and presenting
- Program management experience for large projects

Broad computer experience including word processing, Excel, MS Project, programming and databases.

## CHARLES MAZZANTI

315 Alcatraz Ave  
Oakland CA, 94618  
voicemail: 510.547.7467  
email: [chazmazz@aol.com](mailto:chazmazz@aol.com)

*Computer graphics and design for all media.*

Experienced and proficient in creating user interface design, information design, bitmap, vector and 3D graphics, animations, special effects, digital video and streaming video for CD-ROMs and the internet, multimedia, interactive kiosks, print and package design.

**Clients have included:** Electronic Arts, Oracle Corporation, Sun Microsystems, Knowledge Adventure, Hartford Insurance Group, Ask Jeeves, Cybergold, Volpe, Welty, Wheelan and Brown, The National Japanese American Historical Society and The Smithsonian Institution.

**Using:** Photoshop, After Effects, Illustrator, Premiere, Flash, Fireworks, Infini-D, as well as HTML editors and page layout programs.

**Highlights of experience since 1992:** Electronic Arts, EA.com, Designer, Producer, Designed the EA web presence for E3 as well as the marketing sights for the Nascar, Tripleplay and SSX game franchises.

### **CHILDREN OF THE CRANE, REFLECTIONS OF HIROSHIMA. CD-ROM**

Produced and developed in association with Deloayza Associates. Winner of the ORACLE Innovations in Education Award. Distributed by Forest Technologies and Social Studies Inc. for classroom use, grades four, five and six.

Co - Producer, Co - Developer, Co - Project Manager, Navigation Design, Production Design, 3D Design and Development, Interface Design, Post - Production Digital Video Special Effects, Graphic Design.

### **INTERACTIVE LEARNING CENTER, Interactive Kiosk**

Produced by the NATIONAL JAPANESE AMERICAN HISTORICAL SOCIETY. Commissioned for the SMITSONIAN INSTITUTION's exhibition, More Perfect Union, Japanese Americans and the U.S. Constitution. Recipient of a Civil Liberties Fund Grant.

**Co - Project Manager, Production Design, Navigation Design, Interface Design, 3D Design and Development, Post - Production Digital Video Special Effects.**

**ISO COMPLIANCE INSTRUCTION MANUAL, ENGINEERING DEPARTMENT SUN  
MICROSYSTEMS, Intranet Site**

Produced and designed by Xis Inc. and managed by Deloayza Associates.

**Graphic Design, Production Art.**

**BEST IC LABORATORIES INC., Print**

Presentation Folder. 8 page Brochure, and Specification sheets. Project co-managed by Deloayza Associates and Layer Five.

**Graphic Design and Layout.**

**HARTFORD INSURANCE GROUP, CORPORATE EDUCATION HEADQUARTERS,  
Interactive Kiosk**

Produced by Wehr Associates and Deloayza Associates.

**3D Design and Development, Graphic Design, Production Art.**

**STRATEGIC ENERGY INNOVATIONS, Internet site**

Website interface design and development, logo design.

**ZAMAMERICA PUBLICATIONS, Internet site**

Online Catalogue and E-Commerce site.

**Project Management, Graphic Design.**

**MINCHIATE TAROT, Print**

Created and designed by Brian Williams,

**Digital Compositing, Production Art.**

**FIREWOOD NEW MEDIA, E-Commerce Internet site**

Graphic Design.

**ARTIFACTS, CD-ROM**

Winner of an Oracle Innovations in Education Grant. Art studio for children. Produced and designed by Penelope Finnie at Jack of All Trades.

3D Design and Development, Interface Design, Navigation Design.

**MILL VALLEY FILM FESTIVAL, Print**

Graphic Design

**CYBERGOLD, Internet Site**

3D Design and Development, Graphic Design.

**ASK JEEVES, Internet Site**

Production Art.



**VOLPE, WELTY, WHELAN AND BROWN INVESTMENT BANKING, Internet Site**  
Production Art.

**KNOWLEDGE ADVENTURE, ART ADVENTURE, CD-ROM Prototype.**

3D Design and Development, Interface Design, Production Art.

**ALASKA HEATING AND REFRIGERATION**

Graphic Design for print and Van Design

**SAN FRANCISCO LANDSCAPE AND GARDEN SHOW, Multimedia**

**Showcase and Print Design**

Graphic Design, Production Art.

# Ward Bouwman

2715 Heatherstone Ave. • San Rafael CA • 94903

Phone: (415) 507 1600 • FAX: (415) 507 1600

## Experience

PRESIDENT / FOUNDER: “**e screening room**”. Created, Designed and published a new distribution channel for Independent documentary films and a place where people can watch unabridged documentary film any time anywhere. Since it’s conception ESR has received numerous flattering reports in the press; among those in the “Hollywood Reporter” and “INC .” magazine. <http://escreeningroom.com> .1998 ongoing.

BOARDMEMBER / TREASURER: “**Strategic Energy Innovations**” Created and managed SEI financial health since its creation.

LOCALIZATION MANGER: “**Palladium Interactive, Inc.**” Created and established the Localization Department. Localized over five titles in under eight months, including *Star Warped*, *Microshaft Windblows*, *Ultimate Photo Wizard*, *Ultimate Family Tree*, *The Wish Bone Series*. Localization included redesign of marketing and print materials for all products. Managed a \$100,000 budget and negotiated over \$30,000 in savings. Winter 1997 - 1998.

ASSOCIATE PRODUCER: “**Deloayza Associates**” . Redesigned *Children of the Crane*, a production dealing with the bombing of Hiroshima from a child’s perspective and *Children of the Camp*, a kiosk about the illegal imprisonment of Japanese-American in the US, for the traveling exhibition of the **Smithsonian Museum**. Fall 1997- ongoing.

ASSOCIATE PRODUCER /SALES. “**European Media Support BV.**” EMS is a non-fiction series production company for international broadcast. Program series have been broadcasted by all major European stations, **Discovery Channel**, and **A&E** in the USA. Established contacts with distribution channels during MIP-TV and NATPE. Obtained funding for *Treasures of the Earth* (Discovery Channel). Negotiated contracts on several productions. Initiated production for shoots in DC & NY, varying from street shoots to museum shoots. Located key non-fiction, commercial format writers, directors of photography, post production houses. Developed several series concepts including *Women of Wonder*, *Ancient Engineering*. Fall 95 - Winter 97.

LOCALIZATION MANGER “**Discovery Communication, Inc.**” Started and established the Localization Department for Discovery Channel’s Multimedia Group. Produced 8 CD-ROM titles in German, French and Spanish including: *In the Company of Whales*, *Sharks*, *Beyond Planet Earth*, *Ocean Planet*, good for \$3 million in international sales the following year. Contracted localization companies, created music and effects tracks, contracted and managed in-country reviewers, controlled 60,000 words of text per title, ensured video and audio quality, handled programming issues and managed printing issues concerning the box designs. Winter 1995 - Summer 1995.

ASSOCIATE PRODUCER *Bittersweet: "The Asian-Indian Experience in the USA"* (Independent production by Sanjeev Chatterjee), a 50-minute documentary of the assimilation process of first and second generation Asian-Indians living in the USA. Work included scheduling and budgeting production, managing all releases, additional camera work, negotiating rates, contracting original music, digital audio editing, EDL maintenance, 1/2 inch video edit, contracting **The Cinema Guild** in New York for distribution. Released summer 1995.

PRODUCER *Cinderella and Her Many Sisters* an interactive CD-ROM storytelling experience dealing with 40 different versions of the Cinderella story. Ongoing

PRODUCER/DIRECTOR/EDITOR *River Passages: Cape Girardeau*. A 15-minute pilot emphasizing life on the Mississippi river. Work included all aspects of video field production including stand-up host, contracting original music, managing all releases, and editing on Avid Media Composer. Summer 1995.

PRODUCER *Biennale: International Art Festival 93 Series (Biennale* is an annual gathering from 1000 international artist and 200 art students.) Produced five 20-minute daily programs with 19 person crew at 17 different locations. Responsible for managing crews, onsite trouble-shooting, management of all releases, contracting original music and computer graphics. Production was daily broadcasted on cable and shown to participants. Summer 1993.

PRODUCER **Montague Tandem** 5 minute commercial for a foldable tandem bicycle. April 1994.

PRODUCTION ASSISTANT, **Custom Productions**, Boston. 1993.

LEAD PROGRAMMER: **WonderMedia**. (**MacroMedia's** Lingo for Director). Corporate Title for **Bell Atlantic, Inc.** and *Water Balloons*, a game distributed with **America On-Line's** Tax 95 CD-ROM. Fall 1995.

## Education

**Emerson College**, Boston MA. *Masters of Arts, in Mass Communication*, 1995. Graduate Project: *River Passages: Cape Girardeau*. Course Work: Mass Communication Theory, Research. Documentary Pre-production, Field Production, Studio Production, Corporate Media, Electronic News Gathering. Elective: Interactive Media.

**HTS/HBO 's-Hertogenbosch**, the Netherlands *Bachelor of Science in Electrical Engineering*, 1989. Specialized in Computer Technology. Thesis: *Image Recognition with a Signal Processor*. Course work: Management and Marketing. Computer Graphics, Animation, Communication Technology, Digital Signal Processing, Compiler and Software Engineering, Physics.

## Languages

English, Dutch, German, French.

## Skills

- Matchmaking in the international market between sellers and buyers, talent and producers
- Managing of people and products
- Motivating people with enthusiasm and building teams
- Avid Media Composer
- Camera Operator
- Paltex Switcher
- Grass Valley

- MacroMedia Sound Edit 16
- MacroMedia Director Programming (lingo)
- Page Mill (for web pages)
- Pascal Programming
- 

## General Experience

Lived in The Netherlands, New Zealand, Surinam, Austria, USA. Traveled over 15 countries.

## Affiliation

Bay Area Video Coalition (BAVC)  
 Film Arts Foundation (FAF)  
 Media Alliance San Francisco  
 Association of independent video and filmmakers (AIVF)  
 International Television Association (ITVA)

## References

Harry Moxley, **Discovery Communication, Inc.** (301) 986 0444 x5913  
 Ton Okkerse, **European Media Support.** 011 (31) 356 231 508  
 Sanjeev Chatterjee, Producer/ Director *Bittersweet* (305) 284 2234

## **Appendix C**

### ***Association Partner Summaries***

## **ASSOCIATION PARTNER SUMMARIES**

### **San Diego Housing Federation**

Tom Scott, Executive Director  
San Diego Housing Federation  
450 B St., Suite 1010  
San Diego, CA 92101  
Telephone: (619) 239-6693  
Fax: (619) 239-5523  
Email: [sdhf@housingsandiego.org](mailto:sdhf@housingsandiego.org)  
Website: <http://www.housingsandiego.org/>

Established: 1990  
Board Members: 7  
Members: 119

The San Diego Housing Federation (SDHF) is a coalition of nonprofit and other organizations and individuals working together to produce quality affordable housing and community development for lower income households. The San Diego Housing Federation was formed in 1990 to coordinate an organized approach for community groups to advocate for and grow proficient in developing affordable housing and economic opportunities for lower income people. It has grown into a broad based association whose membership consists of nonprofit affordable housing developers, local government housing agencies, for-profit developers, builders, and lenders, trade associations, social service organizations, and individuals.

The SDHF membership is committed to the creation of a full range of affordable housing choices and to the development of economically viable, strong and stable communities. The SDHF is a 501 (c) 3 tax-exempt charitable corporation governed by an eleven-member board, which meets monthly. SDHF seeks to bring together SDHF members and representatives from all sectors of San Diego County who are interested in the development and management of affordable housing and in community economic development. It serves as a clearinghouse and network of shared information on best practices, successful strategies and projects and current trends in the fields of affordable housing and community economic development. SDHF provides and/or participates in training its members and the community in areas such as needs assessment, financing, construction, management, marketing, assets management service delivery and project evaluation.

SDHF resources, activities, and member services include:

- Monthly newsletter, Housing and Community Development News to 350 groups and individuals, including all members plus elected officials at the local, state and national levels
- Weekly email updates to 175 individuals
- Website that is updated daily and averages 50 visits per day
- Annual awards event honoring the best in the field
- Annual 1 day conference with 4 tracks and 50+ speakers and 250 attendees

- Public policy, coalition and public education initiatives
- Monthly brown bag lunches and breakfast meetings with a speaker and 5-25 attendees, depending on topic
- Membership resource directory

SDHF membership includes:

- 18 non-profit housing developers with an impact on more than 750 housing units
- 13 local government housing agencies,
- 26 for-profit developers, builders, and lenders,
- 9 trade associations
- 15 social service organizations
- 38 individuals
- Networking channels that reach the National Housing Conference, Housing California Board of Directors, Corporation for Supportive Housing, San Diego Housing Coalition, SCANPH, NPH, Sacramento Housing, and the California Housing Consortium

### **Non-Profit Housing Association of Northern California**

Ms. Dianne J. Spaulding, Executive Director  
 369 Pine Street, Suite 350  
 San Francisco, CA 94104-3302  
 Phone: 415-989-8160 x13  
 Fax: 415-989-8166  
 Email: [dianne@nonprofithousing.org](mailto:dianne@nonprofithousing.org)  
 Website: <http://www.nonprofithousing.org/>

Established: 1979  
 Number of Staff: 5  
 Board Members: 13  
 Members: 500

Mission: Preservation and development of affordable housing, provision of support service to improve the lives of those in need; revitalization of neighborhoods and communities through the support of non-profit housing development corporations.

Since its founding in 1979, NPH has evolved in tandem with the affordable housing community it has fostered, nurtured and sustained. For 22 years, NPH has grown and matured along with what is now one of the most highly developed regional infrastructures for affordable housing delivery in the nation. NPH is now one of the most important components of this delivery system.

Over this period, Non-Profit Housing Association of Northern California (NPH) gained a national reputation for many of its capacity building initiatives and leadership in the affordable

housing arena. NPH has been proven in the areas of skills building, technical assistance, legislative advocacy, public policy development, information and referral on housing issues, and community education. NPH's member services reflect its members' needs, and thus evolve with the increasing sophistication of the field. NPH seeks to increase support for affordable housing at the neighborhood, city, region, state and federal levels and to build the capacity of the non-profit housing sector.

NPH resources, activities, and member services include:

- Email broadcasts
- Website, which includes "What's New" Pop-up windows
- A web based action center with links for events/training, campaigns, and a tool box
- A web based knowledge bank, which includes information on policy and other housing groups
- Publications
- Policy advocacy and annual forums
- Board meetings

NPH membership includes:

- 70 non-profit housing developers nonprofit affordable housing developers working primarily in the greater San Francisco Bay Area with an impact on more than 3,500 housing units
- 430+ other non-profits, for-profit, and business members including housing associations and financial organizations

### **California Coalition for Rural Housing**

Mr. Rob Wiener, Executive Director  
926 J St, Suite 1400  
Sacramento, CA 95814-2704  
Phone: 916-443-4448  
Fax: 916-447-0458  
Email: [rob@calruralhousing.org](mailto:rob@calruralhousing.org)  
Website: <http://www.calruralhousing.org>

Established: 1981/1976

Number of staff: 6

Board members: 35

Members: 250

Mission: To achieve federal, state and local housing policies and programs supporting the production and preservation of decent, affordable housing for rural and low income Californians. CCRHP and CCRH are separate organizations, but work toward the common goal of improving rural housing conditions-- the former performs the critical task of constituency-building and education; the latter works directly in the State legislature.



Formed in 1976, the California Coalition for Rural Housing (CCRH) is the oldest, continuous, state low-income housing coalition in the U.S. CCRH is a membership-based organization that represents the interests of approximately 30 community-based, nonprofit and public builders of affordable housing, as well as local government officials, grassroots organizations, and activists, working throughout rural and urbanizing parts of California. Our member builders produce a variety of housing targeted to low- and very low-income households for ownership and rent and for people with special needs. They include the largest developers of mutual self-help housing for first-time owner-builders/homebuyers in the country and the largest developers of farm labor housing in California.

CCRH has a 35-member board of directors of which half are required under our by-laws to be senior staff of nonprofit housing development corporations. Other members are local government officials, lenders, service providers, academics, and low-income community activists. The board meets bi-monthly and, often, monthly when critical State policy and program issues need immediate attention. In addition to frequent board meetings, directors and members are involved as volunteers in a variety of ways. First, CCRH staffs standing committees and ad hoc working groups that meet to discuss organizational business, including recommending policies and actions for board review with regards to personnel, financing, board nominations and elections, and policy and program actions. Typically, working groups are formed to deal with specialized concerns, as when CCRH input is requested on how best to deliver State housing programs in rural areas. Second, our directors and members are often called upon to represent CCRH at State policy and program hearings and other public events. Third, CCRH stages an annual Rural Housing Summit for directors, members, and other parties where participants play a direct role in developing our organization's policy and program agenda for the coming year.

CCRH and its member organizations target that portion of the state's population with dire shelter needs and gross incomes at or below 80% of area median income (AMI), defined as "low income" in federal and state housing programs. In some programs, targeting is much deeper and assistance is limited to households at 50% or less of AMI. In general, these households live in rural towns and places with populations under 20,000, as defined by the U.S. Department of Agriculture. Some housing programs have higher population thresholds. Our geographic reach extends from the Oregon border in the north, to the Mexican border in the south, and east to the border with Nevada and Arizona. This includes large portions of the Central Valley, the Central and North Coasts, the Northern and Eastern Mountains, and the Southern Deserts.

CCRH resources, activities, and member services include:

- Email broadcasts
- Website
- Internship job training programs
- Tenant education and assistance
- Research on issues such as farmworker housing and sustainable communities,
- Database of demographics, poverty, and housing data in rural areas
- Policy advocacy and annual forums
- Board meetings

CCRH membership includes:

- 30 community-based, nonprofit and public builders of affordable housing
- 250 other non-profits, for-profit, and business members including housing associations and financial organizations
- 800 total organizations on CCRH's email distribution list

### **Southern California Association of Non-Profit Housing**

Ms. Jan Breidenbach, Executive Director  
3345 Wilshire Blvd, Suite 1005  
Los Angeles, CA 90010-1810  
Phone: 213-480-1249  
Fax: 213-480-1788  
Email: [jbreidenbach@scanph.org](mailto:jbreidenbach@scanph.org)  
Website: <http://www.scanph.org>

Established: 1989  
Number of Staff: 12  
Board Members: 16  
Members: 550

Mission: Dedicated to the production, preservation and management of permanently affordable housing for low-income people and believe the best vehicle to attain this goal is through the non-profit development community

SCANPH was founded in 1989 when a community of non-profit developers recognized that they had reached a level of growth that required the establishment of an umbrella organization . By 1996, SCANPH grew to over 500 members throughout the region. This membership includes non-profit housing developers, social service agencies and community groups, private businesses, local government agencies, lenders, and individuals all engaged with affordable housing. Members are located in Los Angeles, Orange, Riverside, San Bernardino, Ventura and Santa Barbara Counties.

SCANPH serves as a resource center and clearinghouse for Southern California nonprofit housing developers. SCANPH resources, activities, and member services include:

- A bi-monthly newsletter
- A membership and resource directory
- Regular technical training workshops
- Informal forums covering a variety of current housing issues of interest to the membership
- A clearinghouse for up-to-date information on housing programs and technical assistance referrals

- An annual conference on education, resource sharing, networking, and training for the Southern California non-profit housing community
- Research and analysis on housing issues
- On-going working groups on policy and technical topics

SCANPH membership includes:

- Over 60 community-based, nonprofit and public builders of affordable housing
- 550 other non-profits, for-profit, and business members including housing associations and financial organizations